

(1) First and Final Account and Report of Executor and (2) Petition for Final Settlement and Distribution Accounting Waived (PC 10800, 10810, 10831, 10900, 10951, 11640)

<b>DOD: 10/24/10</b>		<b>JOE YAMASHIRO</b> , Executor is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>OFF CALENDAR.</b> Amended Petition filed and set for 4/28/14.  1. The petition does not include the accounting, i.e. summary of account, receipt schedule, disbursement schedule, etc. 2. Petition does not specifically state the property to be received by each beneficiary after payment of attorney fees and costs. 3. Costs include \$9.76 for postage. Local Rule 7.17 states the court considers postage to be a cost of doing business and therefore not reimbursable. 4. Order does not comply with Local Rule 7.6.1. Monetary distributions must be stated in dollars, and not as percentages of the estate.
		Account period: ???		
		Accounting - ????		
		Beginning POH - \$496,963.24		
		Ending POH - ????		
<b>Cont. from 020414</b>		Executor - waives		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Attorney (statutory) - \$12,939.26		
<input checked="" type="checkbox"/>	<b>Verified</b>	Costs - \$1,060.26 (filing fee, probate referee, publication, recorder, certified copies and postage)		
<input checked="" type="checkbox"/>	<b>Inventory</b>	<b>Distribution, pursuant to decedent's will, is to:</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>	Joe Yamashiro- 1/3		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Nobuko Nobu Sekishiro- 1/3		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Geor Yamashiro - 1/3		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
<input checked="" type="checkbox"/>	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>	4/4/11		
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>	✕		
<input checked="" type="checkbox"/>	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by: KT</b>
<b>Reviewed on: 3/27/14</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 1 – Yamashiro</b>

**Second Amended First and Final Account and Report of Conservator, Petition for  
 Its Settlement, for Attorney Fees and Discharge of Conservator of the Estate**

<b>DOD: 4-17-13</b>		<b>KATINA SAPIEN LOZANO PAULEY</b> , Conservator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Continued from 2-10-14, 3-4-14</u>  1. <b>Petitioner requests distribution to herself as the sole beneficiary pursuant to the decedent's will via declaration under Probate Code §13100. However, the will devises the decedent's estate to the trust. Therefore, the trust is the successor in interest pursuant to Probate Code §13006(a). It does not appear that the estate can be distributed as prayed.</b>
		<b>Account period: 9-19-11 through 12-16-13</b>	
		Accounting: \$ 102,960.95	
		Beginning POH: \$ 37,268.63	
		Ending POH: \$ 17,668.83	
<b>Cont. from 021014, 030414</b>		(\$15,668.83 cash plus \$2,000.00 personal property (household) items)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	Conservator: Waives	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Attorney: \$7,295.00 (per declaration)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	(Note: \$8,874.83 has already been paid pursuant to court order 6-4-12.)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		W
<input type="checkbox"/>	<b>Aff.Pub.</b>	<b>Petitioner prays for an order as follows:</b>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	1. Notice of Hearing of this account, report, and petition be given as required by law;	
<input type="checkbox"/>	<b>Pers.Serv.</b>	2. Settling and accepting this account and report;	
<input type="checkbox"/>	<b>Conf. Screen</b>	3. Authorizing payment of \$7,295.00 to Joanne Sanoian for her services to the petitioner and the conservatorship estate during this account period, and authorizing withdrawal of \$4,609.97 from Chase blocked account xxx5483 and \$2,685.03 from Chase account xxx6758 (total \$7,295.00) in certified funds payable to Joanne Sanoian;	
<input type="checkbox"/>	<b>Letters</b>	4. After payment of the above sums, the Court authorize and direct Katina Sapien Lozano Pauley, Conservator of the Estate, to close Chase Bank blocked account ending in #5483 and deposit the remaining balance into Chase Bank checking account #6758;	
<input type="checkbox"/>	<b>Duties/Supp</b>	5. The Court authorize and direct Katina Sapien Lozano Pauley to distribute the funds remaining in Joanne Sanoian's Client Trust Account into Chase Bank checking account #6758; and that on filing of proper receipts, Petitioner be discharged as conservator of the person and estate;	
<input type="checkbox"/>	<b>Objections</b>	6. That surety on Petitioner's bond be discharged upon filing of an ex parte order for final discharge; and	
<input type="checkbox"/>	<b>Video Receipt</b>	7. For such other orders as the Court deems proper.	
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620(c)</b>		
<input type="checkbox"/>	<b>Order</b>		X
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**Reviewed by:** skc

**Reviewed on:** 3-26-14

**Updates:**

**Recommendation:**

**File 2 – Lozano**

## (1) First and Final Report of Executor, and Waiver of Accounting and (2) Petition for Distribution

<b>DOD: 1/22/12</b>		<b>ROBERT F. PEREZ</b> , Executor, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 3/4/14. Minute order states Counsel will be filing an amended inventory and appraisal as well as an amended final report. As of 3/27/14 there have been no new documents filed.</b>  1. Inventory and appraisal lists the Bank of America account balance as of 3/30/12. Property must be listed at the date of death value. Probate Code §8802.  2. Need property tax certificate.  3. Need property on hand schedule. California Rules of Court, Rule 7.550(b)(4).  4. Order does not comply with Local Rule 7.6.
		Accounting is waived.	
		I & A - \$132,916.63	
		POH - ?????	
<b>Cont. from 021814, 030414</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Attorney - waives	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>	Executor - waives	
<input type="checkbox"/>	<b>PTC</b>	X	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Distribution, pursuant to decedent's Will, of property on hand is to:	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Robert Perez - 100%	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>	5/24/12	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 3/27/14</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 3 – Perez</b>

## (1) First and Final Account and Report of Administrator and Petition for Its Settlement and (2) Allowance of Statutory Commissions and (3) For Final Distribution

<b>DOD: 04/13/12</b>		<b>DARRYL GRANT</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: <b>04/13/12 – 01/31/14</b>	<b>CONTINUED FROM 03/17/14</b> <b>Minute Order from 03/17/14 states:</b> Mr. Diaz is appearing as counsel for Jeff McKinley. Mr. Diaz objects to the Petition and requests a continuance to file written objections.
<b>Cont. from 031714</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		<b>As of 03/26/14, nothing further has been filed in this matter.</b>
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	06/15/12	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		

Accounting	-	<b>\$70,000.00</b>
Beginning POH	-	<b>\$67,000.00</b>
Ending POH	-	<b>\$39,791.26</b> (all cash)
Administrator (statutory)	-	<b>\$2,800.00</b>
Attorney (statutory)	-	<b>\$2,800.00</b>
Costs	-	<b>\$2,266.80</b> (filing fees, publication, certified copies, bond premium, probate referee)
Reserve	-	<b>\$700.00</b>
<b>Distribution, pursuant to intestate succession, is to:</b>		
Darryl Grant	-	\$15,612.23
Raymond Grant	-	\$15,612.23

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 03/26/14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 4 – Grant</b>

(1) First Account and Report of Guardian, (2) Petition for Attorneys' Fees [Prob. C. 2620]

Age: 12 years		MARLEEN C. MAFFEO, mother/guardian, is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		Account period: 7/18/12 – 7/17/13		<b>Continued from 3/4/14. As of 3/27/14 the following issues remain:</b>	
		Accounting - \$246,855.69		1. Need declaration in support of attorney fees. California Rules of Court, Rule 7.751.	
Cont. from 121013, 012814, 030414		Beginning POH - \$235,589.46		2. Need schedule listing the property on hand at the fair market value. Probate Code § 1063(a). (Note: Bank statements show that the current value of the stocks and securities is \$148,652.28. Therefore the fair market value of the estate would total \$389,256.77. This would mean that the bond should be increased to \$440,580.00)	
Aff.Sub.Wit.		Ending POH - \$242,776.50		3. Need order	
✓	Verified	Current bond is \$335,000.00.		<b>Note:</b> If the petition is granted, status hearings will be set as follows:	
	Inventory	Guardian - waives		• <b>Friday, September 11, 2015</b> at 9:00 a.m. in Department 303, for the filing of the second account.	
	PTC	Attorney - \$4,371.63		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
	Not.Cred.	Petitioner prays for an Order:		<b>Reviewed by: KT</b>	
✓	Notice of Hrg	1. Approving, allowing and settling the first account and report;		<b>Reviewed on: 3/27/14</b>	
✓	Aff.Mail	2. Authorizing payment of attorney fees in the sum of \$4,371.63.		<b>Updates:</b>	
	Aff.Pub.			<b>Recommendation:</b>	
	Sp.Ntc.			<b>File 5 – Maffeo</b>	
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	2620(c)				
	Order	X			
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				

Atty Sanoian, Joanne (for Petitioner/Guardian Marleen C. Maffeo

(1) First Account and Report of Guardian, (2) Petition for Attorneys' Fees [Prob. C. 2620]

<b>Age: 9 years</b>	<b>MARLEEN C. MAFFEO</b> , mother/guardian, is petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 3/4/14. As of 3/27/14 the following issues remain:</b>  4. Need declaration in support of attorney fees. California Rules of Court, Rule 7.751.  5. Need schedule listing the property on hand at the fair market value. Probate Code § 1063(a). (Note: Bank statements show that the current value of the stocks and securities is \$148,652.28. Therefore the fair market value of the estate would total \$389,256.77. This would mean that the bond should be increased to \$440,580.00)  6. Need order  <u><b>Note:</b></u> If the petition is granted, status hearings will be set as follows:  • <b>Friday, September 11, 2015</b> at 9:00 a.m. in Department 303, for the filing of the second account.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
	Account period: 7/18/12 – 7/17/13		
<b>Cont. from 121013, 012814, 030414</b>	Accounting	- \$246,855.69	
	Beginning POH	- \$235,589.46	
	Ending POH	- \$242,776.50	
<b>Aff.Sub.Wit.</b>			
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
✓ <b>Notice of Hrg</b>			
✓ <b>Aff.Mail</b>	w/		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
✓ <b>2620(c)</b>			
<b>Order</b>	X		
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

Atty Poochigian, Mark S., of Baker Manock &amp; Jensen (for Petitioner Gregory C. Simonian)

(1) First and Final Report of Personal Representative, Petition for Final Distribution and (2)  
Allowance of Attorneys' Fees on Waiver of Accounting

<b>DOD: 2/22/2013</b>		<b>GREGORY C. SIMONIAN</b> , nephew and Administrator with Will Annexed, is Petitioner.  Accounting is waived.  I & A — <b>\$1,608,506.78</b> POH — <b>\$1,453,935.86</b> (\$124,106.18 is cash)  Administrator — <b>waives</b> (statutory)  Attorney — <b>\$29,085.07</b> (statutory)  Costs — <b>\$451.00</b> (filing fee, certified copies)  Closing — <b>\$10,000.00</b> (for administration expenses and liabilities, including accountant's fees for the fiduciary tax returns;)  <b>Distribution pursuant to Decedent's Will and Codicil is to:</b>  <b>ELAINE SIMONIAN</b> – <b>\$84,570.11 cash</b> , real property, furnishings, furniture, and personal belongings, automobile, and shares of stock.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input checked="" type="checkbox"/>	<b>PTC</b>			
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			W/
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			051513
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by: LEG</b> <b>Reviewed on: 3/26/14</b> <b>Updates: 3/28/14</b> <b>Recommendation: SUBMITTED</b> <b>File 7 – Rudy</b>				

(1) Petition for Final Distribution and (2) for Allowance of Statutory Fees to Attorney  
on Waiver of Accounting

<b>DOD: 8-5-13</b>		<b>ROBERT ALLEN MAXWELL</b> , Executor with Full IAEA without bond, is Petitioner.  Accounting is waived.  I&A: \$182,600.00 POH: \$182,600.00 (cabin plus furniture/furnishings, tools/equipment)  Executor (Statutory): Waives  Attorney (Statutory): \$6,478.00 (to be paid outside of probate)  Costs: Not stated (costs to be paid outside of probate includes cost for preparation and filing of tax returns.)  <b>Distribution pursuant to Decedent's will and Disclaimer filed 1-6-14:</b>  Robert Allen Maxwell: Entire estate (cabin plus furniture/furnishings, tools/equipment)	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. The Inventory and Appraisal indicates at #5 (Property Tax Certificate) that the requirements of Revenue and Taxation Code §480 are not applicable because the decedent owned no real property at the time of death.  However, the cabin (#3 on the I&A valued at \$180,000.00) does have a parcel number.  The Court may require clarification as to the Property Tax Certificate. Is the cabin not considered real property?	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
✓	<b>PTC</b>			X
✓	<b>Not.Cred.</b>			
N/A	<b>Notice of Hrg</b>			
N/A	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
✓	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 3-26-14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 8 – Maxwell</b>



## Petition by Personal Representative for Leave to Resign

<b>DOD: 2-18-10</b>		<b>DAVID J. EDWARDS</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need Duties and Liabilities of Personal Representative and Confidential Supplement (DE-147 and DE-147S) from Proposed Successor Administrator Bruce D. Bickel.</b>  <b>2. Need order.</b>  <b>Note:</b> On 12-5-13, the Court set status hearings as follows:  • <b>Friday, 05/02/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b> • <b>Friday, 02/06/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.
		Petitioner was appointed Administrator with Full IAEA with bond of \$99,000.00 on 12-5-13; however, bond has not been filed and Letters have not issued.	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
Petitioner states he has been unable to obtain the probate bond ordered by the Court on 12-5-13 and it is therefore necessary that he resign as Administrator and that the Court appoint a Successor Administrator. Bruce D. Bickel is agreeable to act. Consent attached.			
Petitioner states that during the time period from 12-5-13 to the present, Petitioner has undertaken no action on behalf of the estate and has not come into possession of any property.			
Petitioner states the only property of the estate known to Petitioner is the sum of \$98,957.13, which is not in the possession of Petitioner, but has escheated to the State of California and is currently being held by John Chiang, California State Controller.			
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 3-26-14			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 9 – Girazian</b>			

<b>Peter Tym</b> <b>DOD: 2-23-13</b>	<b>CENTRAL CALIFORNIA CONFERENCE OF SEVENTH-DAY ADVENTISTS</b> , Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <u>Continued from 2-25-14</u>
<b>Doris Tym</b> <b>DOD: 4-2-09</b>	Petitioner states the Peter & Doris Tym 2000 Family Charitable Remainder Unitrust was created between Petitioner as trustee and Peter and Doris Tym as settlors or donors. The trust agreement provides as follows:	
<b>Cont. from 022514</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<ul style="list-style-type: none"> <li>• Confirms donors' transfer of certain parcels of real property to the trustee</li> </ul>	
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	<ul style="list-style-type: none"> <li>• Defines "unitrust percentage" to be the amount used to determine the "unitrust amount" and states the "unitrust percentage" shall be 6.18%</li> </ul>	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<ul style="list-style-type: none"> <li>• States the "unitrust recipients" shall be Peter and Doris Tym and their children, Ardyth B. Price, Sharon M. Foley, and Bonnie Lea J. Corson</li> </ul>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w	
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>	<ul style="list-style-type: none"> <li>• States that at the end of the period described in Paragraph 6, the then-remaining principal and income of the trust shall be distributed free of trust to Petitioner</li> </ul>	
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>	<ul style="list-style-type: none"> <li>• States that commencing January 1 of the year after the parcels referred to in above are sold by the trustee, the "unitrust amount" shall be an amount equal to the "unitrust percentage" (6.18%) multiplied by the net fair market value of the trust assets value as of the first day of each calendar year, adjusted as otherwise provided for in the trust agreement (not applicable to this petition)</li> </ul>	
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>	<ul style="list-style-type: none"> <li>• States the trustee shall pay the "unitrust amount" each taxable year of the trust in monthly installments at the end of each month, and also states that the installments are to be paid to or applied for the benefit of the donors, or the survivor of them, during their lifetimes, and upon both of their deaths, these installments are to be paid in equal shares to or for the benefit of the unitrust recipients (the donors' daughters) living at the time of such distribution.</li> </ul>	
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 3-26-14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 10 – Tym</b>
	<p align="center"><b><u>SEE ADDITIONAL PAGES</u></b></p>	

## Page 2

**Petitioner states that** by 10-3-2000, the trustee had completed the sales of real property and on 1-31-01 began paying the unitrust amount on a monthly basis to the donors until 3-31-09. Doris Tym died on 4-2-09. Thereafter, commencing 4-30-09, Petitioner paid the monthly installments to Peter Tym until 1-31-13. Peter Tym died on 2-23-13.

Petitioner states that in the meantime, in the first few months of 2010, after Doris' death, Les Palinka, Peter Tym's independent legal counsel (also nephew) contacted Petitioner's legal counsel Grant N. Mitchell by phone and informed him that Mr. Tym wished to have the entire corpus of the trust be distributed free of trust to Petitioner as the charitable beneficiary of the trust immediately upon his death, without any portion of the unitrust amount being paid to or for the benefit of his daughters. Mr. Palinka asked Mr. Mitchell if there was something Mr. Tym could do to carry out his wishes. Mr. Mitchell informed Mr. Palinka that he would review the document.

On or about 4-20-10, Mr. Mitchell contacted Mr. Palinka and informed him that pursuant to his review, it appeared that each donor reserved the right to revoke and terminate the interests of any other unitrust recipient in his or her one-half interest. If either donor exercised this testamentary power of revocation, then at that donor's death, that donor's one half interest in the unitrust amount was to be distributed to the remaining unitrust recipient, if any, whose interests were not revoked, and if none, to Petitioner, free of trust, as the charitable beneficiary. The trust also states that a donor who is a current income recipient retains the right to direct the trustee to distribute an undivided percentage of trust assets on the last day of any taxable year to qualified exempt organizations. Petitioner is and at all times has been a qualified exempt organization as defined in the trust.

Mr. Mitchell expressed his opinion that the term "an undivided percentage" included 100% and stated that he was not advising either Mr. Palinka or Mr. Tym to take either or both of these actions; he was only responding to the inquiry of options under the agreement.

About one year later, Mr. Tym executed a Last Will and Testament which revokes and terminates the interests of any and all other unitrust recipients set forth in the trust agreement, and states that Mr. Tym was specifically, intentionally, and knowingly directing that the trustee immediately distribute Mr. Tym's one half interest in the trust corpus to Petitioner.

Petitioner states the effect of the will was to require Petitioner as trustee to distribute Mr. Tym's one half interest in the trust corpus to Petitioner as the charitable beneficiary and to use the remaining trust corpus (Doris Tym's one half interest) to or for the benefit of Sharon M. Foley and Bonnie Lea J. Corson (Ardyth M. Price having previously died), and upon their deaths, to distribute the remaining trust principal to Petitioner as the charitable beneficiary.

**SEE ADDITIONAL PAGES**

## Page 3

On 5-9-11, Mr. Palinka asked Mr. Mitchell to prepare and send Mr. Palinka a form of instruction letter whereby Mr. Tym could direct Petitioner as trustee to distribute 100% of the remaining trust assets to Petitioner as the charitable beneficiary on the last day of any trust taxable year in which Mr. Tym's death occurred. On 6-23-11, Mr. Mitchell sent Mr. Palinka a form of instruction letter and expressly informed him that it was Petitioner's understanding that Mr. Palinka was acting as Mr. Tym's attorney and that Mr. Mitchell was not acting as Mr. Tym's attorney in that matter; that Mr. Mitchell made no representations whatsoever as to what tax or other effect Mr. Tym's execution of the instruction letter may or may not have, etc.

Mr. Palinka did prepare such an instruction letter and reviewed same with Mr. Tym on 8-8-11 regard to the potential consequences of executing it. Mr. Tym expressed his desire to execute the instruction letter and did so. Mr. Palinka advise Mr. Mitchell of these facts and that he was sending the instruction letter to Mr. Mitchell via US Mail, which Mr. Mitchell received 8-10-11.

The effect of the instruction letter was to require Petitioner as trustee on the December 31 following Peter Tym's death to distribute to Petitioner as charitable beneficiary of the trust and free of trust the remaining one half interest in the trust income and principal not covered by Peter Tym's exercise of his testamentary power of revocation in his will.

On 1-1-13, and continuing through the present time, the trust corpus has consisted entirely of cash, and on 1-1-13 the cash totaled \$246,888.55. On or about that date, pursuant to the trust agreement, the trustee multiplied that amount by 6.18% (the unitrust percentage) to arrive at a figure of \$15,257.71 (the unitrust amount), which divided by 12 determines the monthly installment of \$1,271.48 paid to Peter Tym on 1-31-13.

Shortly after Mr. Tym's death on 2-23-13, and pursuant to the instructions in his will, Petitioner subtracted Mr. Tym's one half interest in the unitrust amount leaving a remaining unitrust amount monthly installment balance of \$635.74 to be divided equally between the two surviving daughters for the remaining 11 months.

Although Mr. Tym's will directed Petitioner to distribute to itself Peter Tym's one half interest upon his death, Petitioner has not distributed any portion or income thereon pending instructions from this Court. Also, although Mr. Tym's instruction letter directed Petitioner to distribute to itself, as the charitable beneficiary of the trust and free of trust on 12-31-13 the remaining one half interest in the trust principal and income not affected by Mr. Tym's will, Petitioner has not made any distributions of that principal or income thereon pending instructions from this Court.

**SEE ADDITIONAL PAGES**

**Page 4**

**Petitioner requests instructions directing Petitioner as trustee on how to distribute the principal and income in the trust. It is Petitioner's belief that the Court should:**

- A. Make a finding that in calculating the monthly installment, as of 2-28-13, on the basis of one half of the trust corpus as valued on 1-1-13, and thereafter paying the sum of \$3,496.57 to the two living daughters, that Petitioner acted properly as trustee and fulfilled its obligations to make distributions to the two living daughters; and**
- B. Instruct Petitioner that Petitioner as trustee should forthwith distribute free of trust the entire remaining trust estate to itself as the charitable beneficiary.**

**Petitioner prays for an order instructing the trustee with regard to the proper administration of the trust with respect to the matters alleged herein, for costs herein, and for such other orders as the Court may deem proper.**

**Memorandum of Points and Authorities also provided.**

## Petition for Order Confirming Trust Assets

<b>Lucrezia Policarpo</b> <b>DOD: 7-16-07</b>			<b>FRANK J. POLICARPO and DONNETTA M. POLICARPO</b> , Co-Trustees of the Policarpo Family Trust U/D/T/ dated 6-1-07 (the Family Trust), are Petitioners.  Petitioners state the Family Trust is a sub-trust of the Jimmie Policarpo and Lucrezia Policarpo Trust dated 1-23-96 and amended and restated on 6-1-07. Upon the death of Lucrezia Policarpo on 7-16-07, the trust was divided into the Survivor's Trust and the Family Trust. Certain real property on N. Warren Street in Fresno was allocated to the Family Trust by Jimmie Policarpo per quitclaim deed recorded 9-29-09 (attached).  On or about 8-24-12, Jimmie Policarpo borrowed \$82,000.00 and in connection with the loan, transferred the residence out of the Family Trust by deed recorded 8-24-12 and executed a deed of trust on that date (attached).  After the loan was obtained, Jimmie Policarpo did not transfer title back to the Family Trust. Jimmie Policarpo died on 8-5-13.  Petitioners state Jimmie Policarpo transferred the residence out of the Family Trust and into his own name to facilitate obtaining the loan and did not intend to make a distribution of the residence from the Family Trust. Petitioners state that in connection with the loan transaction, Jimmie Policarpo held title to the residence under a constructive trust and that the residence was under Jimmie Policarpo's control as trustee of the Family Trust. Petitioners request that this Court confirm that the residence is part of the Family Trust.  <b>Petitioners pray for an order that the real property commonly known as 7247 North Warren Avenue, Fresno, California, 93711 (legal description provided) is an asset of the Policarpo Family Trust U/D/T dated 6-1-07.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Jimmie Policarpo</b> <b>DOD: 8-5-13</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	w		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCC/JEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

**Petition to Determine Succession to Real Property and Personal Property (Prob. C. 13151)**

<b>DOD: 02/28/12</b>		<b>CYNTHIA REY MCKENZIE</b> , daughter, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		40 days since DOD.	1. The Petition (and will) indicate that the Decedent had a predeceased spouse, therefore the spouse's name and date of death should be listed on attachment 14 (see Local Rule 7.1.1D).
		No other proceedings.	
<b>Cont. from</b>		I & A - \$43,000.00	2. The Petition is not marked at item 9(a)(7) or (8) regarding issue of a predeceased child.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		3. Need Order.
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Will dated 03/05/11 devises real property located at 124 Harrison Street in Coalinga to Petitioner.	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/o	Petitioner requests Court determination that decedent's 100% interest in real property located at 124 Harrison Street, Coalinga, CA pass to her pursuant to decedent's will.
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCC/JEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 03/27/14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 12 – Rey</b>

# 13      Aliah Richardson and Jasmine Richardson (GUARD/P)

Case No. 09CEPR00189

Atty      Richardson, Robert (pro per – maternal grandfather/Petitioner)  
 Atty      Pierce (Richardson), Tina (pro per – maternal step-grandmother/Guardian)  
**Petition for Visitation**

<b>Aliah, 5</b>		<b>ROBERT RICHARDSON</b> , maternal grandfather, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Jasmine, 4</b>			
<b>Cont. from</b>		<b>TINA PIERCE (formerly Tina Richardson)</b> , maternal step-grandmother, was appointed as guardian of Aliah on 06/18/09 and as guardian of Jasmine on 06/02/10.	1. <i>Need Notice of Hearing.</i>  2.    Need proof or service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> <u>or</u> Declaration of Due Diligence for: a.    Tina Pierce (Richardson)(Guardian) b.    Aliah's father c.    David Massey, Jr. (Jasmine's father) d.    Paternal grandparents (all)
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Father (Aliah): UNKNOWN	
<input type="checkbox"/>	<b>Inventory</b>	Father (Jasmine): DAVID MASSEY, JR.	
<input type="checkbox"/>	<b>PTC</b>	Paternal grandparents: UNKNOWN	
<input type="checkbox"/>	<b>Not.Cred.</b>	Maternal grandmother: EVELYN WADLEY – deceased	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	<b>Petitioner states</b> that a visitation plan was established during mediation and implemented without a problem; however, the guardian has failed to follow the agreed upon plan. Petitioner would like to resume visiting with his granddaughters as agreed upon during mediation.
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 03/27/14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 13 – Richardson</b>



**Amended Carol Bailey Living Trust 1998**

Case No. 13CEPR00198

St. Louis, Allison M. (Pro Per Petitioner)

Winter, Gary L. (for David and Arlene Liles, Guardians of the Person and Guardians Ad Litem of Beneficiary Raven Nicole Bailey)

First Accounting and Report of Allison M. St. Louis, Representative of Prior Trustee, David J. St. Louis, and Petition for Payment of Fees and Costs and [Proposed] Order

		<b>ALLISON ST. LOUIS</b> , representative of former trustee <b>DAVID J. ST. LOUIS</b> , is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note re History:</b> David and Arlene Liles, Guardians of the Person and Guardians Ad Litem for Raven Nicole Bailey, minor beneficiary, filed a petition to appoint a successor trustee upon the vacancy due to the death of David St. Louis on 10-7-12. On 5-21-12, the Court granted the petition and appointed H.F. Rick Leas, professional fiduciary, with bond of \$500,000.00, and ordered this accounting of the prior trustee's administration to be filed by Ms. St. Louis.  <b>Note:</b> Attached to this petition is the Independent Accountant's Compilation Report prepared by Dritsas Groom McCormick LLP.
		<b>Account period:</b> <b>9-5-07 through 12-31-12</b> Accounting: \$872,733.60 Beginning POH: \$683,204.07 Ending POH: \$486,664.47	
	<b>Aff.Sub.Wit.</b>		<b>1. Need filing fee of \$435.00.</b>  This petition was filed with a fee waiver based on Ms. St. Louis' personal household income; however, this petition indicates trust assets of \$486,664.47 at the end of the account period (12-31-12) and the Liles' original petition indicated the current value of the trust assets was \$532,114.73.  <b>2. Need Notice of Hearing and proof of service of Notice of Hearing at least 30 days prior to the hearing per Probate Code §17203 on all interested persons.</b>  <b>3. Petitioner does not specify the amount of compensation requested for the three month period for which the former trustee was not paid, and Petitioner also does not indicate who payment should be made to. It does not appear that a probate has been established or personal representative appointed for Mr. St. Louis.</b>  <b>4. Need order.</b>
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	X	
	<b>Aff.Mail</b>	X	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
<b>Petitioner requests that Mr. Leas, the current trustee, be directed to pay Mr. St. Louis' fees earned prior to death. Mr. St. Louis was last compensated in the amount of \$1,800.00 on 7-19-12 for the period covering 1-1-12 through 6-30-12. Therefore, he is owed compensation for the period 7-1-12 through 10-6-12 in an amount to be determined by the Court. Additionally, Mr. St. Louis' costs include \$124.01 for photocopies and postage. See Exhibit 2.</b>			
<b>Petitioner also requests that Mr. Leas be directed to repay Petitioner for her time in the amount of \$631.00 (for 33.05 hours @ \$20/hr) and costs in the amount of \$19.05. Petitioner states she acted in the best interest of the trust while there was no trustee to keep the trust active by keeping the Liles' informed of the condition of the estate, creditors apprised of the situation regarding payment of bills for Raven Bailey, etc. Petitioner states she met with Attorney Gary Winter for legal advice and met with the Arlene Liles and Karl Preheim of Wells Fargo regarding the trust investments. See Exhibit 3.</b>			
<b>Petitioner requests that this accounting be accepted by the Court; that the trustee be directed to pay appropriate fees and costs to the Estate of David J. St. Louis for his services from 7-1-12 through 10-6-12; and that the trustee be directed to pay Allison M. St. Louis her fees and costs as requested.</b>			

Pro Per Villagomez, Margarita (Pro Per Petitioner, mother)  
 Atty Walters, Jennifer L., of Walters & Moshrefi (for Guardian/Respondent Hilda Del Bosque)

## Petition for Termination of Guardianship

<b>Age: 1 year</b>		<b>MARGARITA VILLAGOMEZ</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>HILDA DEL BOSQUE</b> , paternal grandmother, was appointed Guardian on 7/16/2013.	<b>Note for Respondent:</b>
<b>Cont. from</b>		Father: <b>ANDREW MARQUEZ</b>	1. Need proof of mailed service of Notice of Hearing with a copy of the Response to Petition for Termination of Guardianship pursuant to Probate Code §§ 1460 and 1511 for the following persons:
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Paternal grandfather: Andrew Ruiz Marguez Maternal grandfather: Carlos Angulo; deceased. Maternal grandmother: Maxine Angulo	<ul style="list-style-type: none"> <li>• Margarita Villagomez, mother;</li> <li>• Andrew Marquez, father;</li> <li>• Andrew Ruiz Marguez, paternal grandfather;</li> <li>• Carlos Angulo, maternal grandfather;</li> <li>• Maxine Angulo, maternal grandmother;</li> <li>• Kiara Vasquez, sibling;</li> <li>• Destiny Marquez, sibling;</li> <li>• Oscar Villagomez, sibling;</li> <li>• Johnny Villagomez, sibling.</li> </ul>
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>Petitioner states</b> she is requesting that her daughter be returned to her custody, as she agreed to the temporary guardianship at the time because she was unstable when her daughter was born, but since that time she has completed a substance abuse program and she has also completed parenting classes. Petitioner states she resides in a safe, stable home and she is currently seeking employment. Petitioner states she is determined to get her life back on track, which includes getting her daughter back. Petitioner states she loves her daughter and she wants to be there for her every day and be a good role model for her.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/O	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>	<b>Court Investigator Jo Ann Morris' Report was filed on 3/24/2014.</b>	
<input checked="" type="checkbox"/>	<b>Clearances</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>~Please see additional page~</b>			
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 3/27/14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 15 – Marquez</b>

***Response to Petition for Termination of Guardianship filed 3/7/2014 states:***

- On 5/14/2013 she petitioned the Court for temporary and general guardianship of her granddaughter, Bella;
- On 7/16/2013, she was granted guardianship, and at the time Bella was only about 6 months old;
- Although the mother, Margarita, would like the Court to believe she voluntarily consented to the guardianship of Bella and that is why it was granted, this is not the case;
- Margarita had no choice but to provide her guardianship as CPS indicated if someone did not step up, Bella would be removed from her care and placed in foster care; two of Bella's older siblings, who are not my grandchildren, are currently wards of the CPS court;
- It has been ~6 months since the granting of the guardianship by this Court, and Bella is 1 year old and has lived with her (Hilda/Guardian) for her entire life;
- Since they were last in Court, Margarita has only seen Bella a handful of times and for only a couple of hours each time; Bella does not have a bond with Margarita and it is disappointing to see Margarita take these steps to remove her from her care;
- She has never stood in the way of Margarita spending time with Bella; rather she has tried to make visits happen;
- Margarita has no transportation and therefore she (Hilda/Guardian) would try to take Bella to Margarita's home; Bella would cry as she walked away and according to Margarita, Bella would cry herself to sleep and sleep the entire visit;
- Margarita may have completed a parenting program; however, there has not been enough progress in Margarita's sobriety from drugs or proof that she has changed her life to warrant termination of guardianship;
- One of Margarita's children is living with her in a sober living home she shares with another mother and child; however, the eldest of her daughters is still in foster care;
- Margarita has not lived on her own since the removal of Bella, and she is still living in a sober living home sponsored by CPS; when the time runs out, she will possibly not have any housing; she does not work and receives welfare to assist in costs; she (Hilda/Guardian) is not looking down on Margarita for receiving assistance, but rather trying to show that Margarita has not shown it is an appropriate time for Bella to be returned to Margarita's care;
- The reason behind the children's initial removal was for drug use; Margarita is still engaging in a relationship with her son, who is currently incarcerated for drug possession;
- She can't imagine Margarita has learned to deal with her substance abuse issues when she is still keeping relationship with those she commingled with during her drug use;
- Even since CPS has become involved, Margarita still frequents the home of her brother, who uses marijuana in her presence;
- She has no doubt Margarita loves Bella, but she has not been her mother since the day she was born and as a result Bella is not bonded to her, nor does she even know who she is;
- As Margarita stated, she is working on getting her life on track;
- She agrees she needs to focus on that and at this time it is far too soon to remove Bella from the only home she knows to put her in an environment that could be detrimental to her health and safety.

16      **Anabell Chang (GUARD/P)**  
 Atty      Yang, Bee (Pro Per – Co-Petitioner – Sister)  
 Atty      Chang, Bobby (Pro Per – Co-Petitioner – Maternal Uncle)  
 Atty      Thao, Neng (Pro Per – Co-Petitioner – Maternal Aunt)

Case No. 14CEPR00076

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

<b>Age: 1</b>		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>BEE YANG</b> , sister, <b>BOBBY CHANG</b> , uncle, and <b>NENG THAO</b> , aunt, are petitioners.		1. Need Notice of Hearing.	
<b>Cont. from</b>		Father: <b>KONGMENG THAO</b> , Consents and Waives Notice		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input type="checkbox"/>		<ul style="list-style-type: none"> <li>• Paternal Grandparents (Not Listed)</li> <li>• Nhia Chang Cha (Maternal Grandfather)</li> <li>• Chao Lor (Maternal Grandmother)</li> </ul>	
✓	<b>Verified</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Inventory</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>PTC</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Not.Cred.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	x		
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	x		
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input type="checkbox"/>	n/a		
✓	<b>Conf. Screen</b>	<input type="checkbox"/>			
✓	<b>Letters</b>	<input type="checkbox"/>			
✓	<b>Duties/Supp</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>			
✓	<b>CI Report</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>			
✓	<b>Order</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>			
✓	<b>UCCJEA</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>			
		Mother: <b>MOR CHANG</b> , Deceased			
		Paternal Grandparents: Not Listed			
		Maternal Grandfather: Nhia Chang Cha			
		Maternal Grandmother: Chao Lor			
		<b>Petitioners state:</b> minor's mother has passed away. The father is not emotionally capable of caring for the child due to the passing of the child's mother.			
		Attached to the petition is a signed letter from the father giving consent of guardianship of the minor to Bee Yang, Bobby Chang and Neng Thao.			
		<b>Court Investigator Jennifer Young's report filed 03/24/2014.</b>			
				<b>Reviewed by:</b> LV	
				<b>Reviewed on:</b> 03/27/2014	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 16 – Chang</b>	

**17**      **Levi Samuel Moore (GUARD/P)**  
**Atty**    **Silva, Scott (Pro Per – Petitioner – Maternal Uncle)**  
**Atty**    **Silva, Mary (Pro Per – Petitioner – Maternal Aunt)**

**Case No. 14CEPR00077**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age: 14</b>		<b><u>TEMPORARY EXPIRES 04/01/14</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>SCOTT SILVA</b> and <b>MARY SILVA</b> , maternal uncle and aunt, are Petitioners.		1. Need Notice of Hearing.	
<b>Cont. from</b>		Father: <b>KEVIN MOORE</b>		2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
	<b>Aff.Sub.Wit.</b>			<ul style="list-style-type: none"> <li>• Kevin Moore (Father)</li> <li>• Nancy Colvin Moore (Mother)</li> <li>• Levi Samuel Moor (Minor)</li> </ul>	
✓	<b>Verified</b>	Mother: <b>NANCY COLVIN MOORE</b>		3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
	<b>Inventory</b>	Paternal grandfather: Jerry Moore		<ul style="list-style-type: none"> <li>• Jerry Moore (Paternal Grandfather)</li> <li>• Diane Moor (Paternal Grandmother)</li> <li>• Lamon Colvin (Maternal Grandfather)</li> <li>• Maternal Grandmother (Not Listed)</li> <li>• Rodney Moore (Sibling)</li> <li>• Roy Moore (Sibling)</li> </ul>	
	<b>PTC</b>	Paternal grandmother: Diane Moore			
	<b>Not.Cred.</b>				
	<b>Notice of Hrg</b>	x	Maternal grandfather: Lamon Colvin		
	<b>Aff.Mail</b>	x	Maternal grandmother: Not Listed		
	<b>Aff.Pub.</b>		Siblings: Rodney Moore, Roy Moore, Tzietel Moore		
	<b>Sp.Ntc.</b>				
	<b>Pers.Serv.</b>	x	<b>Petitioner states</b> that there is a guardianship in place in Shasta County, but the current guardians can no longer care for the minor. The minor is now living with Petitioners. The mother has no visitation rights and has a restraining order against her protecting the father and minor. Mother is to have no contact with the minor, but the father cannot set boundaries with regard to the mother and cannot fully protect the minor from the mother.		
✓	<b>Conf. Screen</b>				
✓	<b>Letters</b>				
✓	<b>Duties/Supp</b>				
	<b>Objections</b>				
	<b>Video Receipt</b>				
✓	<b>CI Report</b>				
	<b>9202</b>				
✓	<b>Order</b>		<b>Court Investigator Julie Negrete's report filed on 03/25/2014.</b>		
	<b>Aff. Posting</b>				
	<b>Status Rpt</b>				
✓	<b>UCCJEA</b>				
	<b>Citation</b>				
	<b>FTB Notice</b>				
				<b>Reviewed by:</b> LV	
				<b>Reviewed on:</b> 03/27/2014	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 17 – Moore</b>	

18 **Leroy Graves (Estate)**  
 Atty Graves, Elgeron (Pro Per – Co-Petitioner – Son)  
 Atty Myles, Dale (Pro Per – Co-Petitioner – Daughter)  
 Atty Atkinson, Elvie Alene (Pro Per – Co-Petitioner – Daughter)

Case No. 14CEPR00164

Petition for Letters of Administration (Prob. C. 8002, 10450)

<b>DOD: 07/16/2002</b>		<b>ELGERON GRAVES, DALE MYLES, and ELVIE ALENE ATKINSON,</b> children, are petitioners and request appointment as Administrators.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>The deficiencies with the pleadings include, but are not limited to, the following:</b>  1. Need Notice of Petition to Administer Estate. 2. Need Affidavit of Publication. 3. Need proof of service of the Notice of Petition to Administer Estate on all heirs entitled to notice. 4. #5a(1) or #5a(2) was not answered regarding spouse. 5. #5a(3) or #5a(4) was not answered regarding a registered domestic partner. 6. #5a(7) or #5a(8) was not answered regarding issue of predeceased child. 7. Need Duties and Liabilities. 8. Need Confidential Supplement to Duties & Liabilities of Personal Representative. 9. Need Order. 10. Need Letters. <u><b>Note:</b> If the petition is granted status hearings will be set as follows:</u>  • <b>Friday, 09/05/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Friday, 06/05/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<b>Cont. from</b>			
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		Limited IAEA - ?	
<input checked="" type="checkbox"/> <b>Verified</b>		Decedent died intestate	
<input type="checkbox"/> <b>Inventory</b>			
<input type="checkbox"/> <b>PTC</b>		Residence: Fresno	
<input type="checkbox"/> <b>Not.Cred.</b>		Publication: Need	
<input type="checkbox"/> <b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	<u><b>Estimated value of the Estate:</b></u> Real Property - <b>\$209,545.00</b>	
<input type="checkbox"/> <b>Aff.Mail</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Aff.Pub.</b>	<input checked="" type="checkbox"/>	Probate Referee: Steven Diebert	
<input type="checkbox"/> <b>Sp.Ntc.</b>			
<input type="checkbox"/> <b>Pers.Serv.</b>			
<input type="checkbox"/> <b>Conf. Screen</b>			
<input type="checkbox"/> <b>Letters</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Duties/Supp</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Objections</b>			
<input type="checkbox"/> <b>Video Receipt</b>			
<input type="checkbox"/> <b>CI Report</b>			
<input type="checkbox"/> <b>9202</b>			
<input type="checkbox"/> <b>Order</b>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>Aff. Posting</b>			
<input type="checkbox"/> <b>Status Rpt</b>			
<input type="checkbox"/> <b>UCCJEA</b>			
<input type="checkbox"/> <b>Citation</b>			
<input type="checkbox"/> <b>FTB Notice</b>			
<b>Reviewed by:</b> LV			
<b>Reviewed on:</b> 03/27/2014			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 18 – Graves</b>			

19 **Mellisse' Poole & Mikayla Poole (GUARD/P)**  
 Atty Poole, Mary F. (pro per – paternal grandmother/Petitioner)  
 Atty Perkins, Dianna L. (pro per – paternal aunt/Petitioner)

Case No. 14CEPR00243

**Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)**

<b>Mellisse', 14</b>		<b>GENERAL HEARING 05/21/14</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Mikayla, 12</b>			
<b>Cont. from</b>		<b>MARY POOLE</b> , paternal grandmother, and <b>DIANNA PERKINS</b> , paternal aunt, are Petitioners.  Father: <b>RALPH POOLE</b> – Consent & Waiver of Notice filed 03/19/14  Mother: <b>MICHELLE POOLE CASTILLO</b>  Paternal grandfather: DECEASED  Maternal grandfather: DECEASED Maternal grandmother: VERONICA DeGUNTHER	1. Need Notice of Hearing. 2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Temporary Petition or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Michelle Castillo (mother) b. Mellisse' (minor) c. Mikayla (minor) 3. Dianna Perkins' Confidential Guardian Screening Form is blank at the following items: #3 – I have/have not been charged with, arrested for, or convicted of a crime deemed to be a felony or a misdemeanor. #5 – I am/am not receiving services from a psychiatrist, psychologist, or therapist for a mental health-related issue. #10 – Have you, or has any other person living in your home, been charged with, arrested for, or convicted of a crime involving illegal substances or alcohol? #12 – Do you suffer from any physical disability that would impair your ability to perform the duties of a guardian? #19 – I have/have not filed for bankruptcy within the last 10 years.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	x	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Petitioners allege</b> that the children live with their mother who is very volatile and has uncontrollable outbursts. The mother has made false statements to Mikayla to try to turn her against her father. Mikayla is in need of counseling from the problems created by her mother. Mellisse' has special needs that her mother is not meeting, including failing to seek adequate medical attention for her. Petitioners allege that the mother takes strong medications and is not supposed to drive with the children in the car, but she has been observed driving them nevertheless. Petitioner's allege that the mother's behavior has escalated and is out of control and they believe a she needs a psychological evaluation. Petitioners allege that two very recent outbursts by the mother turned violent and there are police reports to substantiate the mother's behavior. Petitioners allege that there is an urgent need for temporary guardianship to protect the minors from their mother.			<b>Reviewed by:</b> JF <b>Reviewed on:</b> 03/27/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 19 – Poole</b>

<b>DOD: 11-24-11</b>  <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;"></td><td style="width: 80%;"><b>Aff.Sub.Wit.</b></td><td style="width: 10%;"></td></tr> <tr><td>✓</td><td><b>Verified</b></td><td></td></tr> <tr><td></td><td><b>Inventory</b></td><td></td></tr> <tr><td></td><td><b>PTC</b></td><td></td></tr> <tr><td></td><td><b>Not.Cred.</b></td><td></td></tr> <tr><td>✓</td><td><b>Notice of Hrg</b></td><td></td></tr> <tr><td>✓</td><td><b>Aff.Mail</b></td><td>W</td></tr> <tr><td></td><td><b>Aff.Pub.</b></td><td></td></tr> <tr><td></td><td><b>Sp.Ntc.</b></td><td></td></tr> <tr><td></td><td><b>Pers.Serv.</b></td><td></td></tr> <tr><td></td><td><b>Conf. Screen</b></td><td></td></tr> <tr><td>✓</td><td><b>Letters</b></td><td></td></tr> <tr><td>✓</td><td><b>Duties/Supp</b></td><td></td></tr> <tr><td></td><td><b>Objections</b></td><td></td></tr> <tr><td></td><td><b>Video Receipt</b></td><td></td></tr> <tr><td></td><td><b>CI Report</b></td><td></td></tr> <tr><td></td><td><b>9202</b></td><td></td></tr> <tr><td>✓</td><td><b>Order</b></td><td></td></tr> <tr><td></td><td><b>Aff. Posting</b></td><td></td></tr> <tr><td></td><td><b>Status Rpt</b></td><td></td></tr> <tr><td></td><td><b>UCCJEA</b></td><td></td></tr> <tr><td></td><td><b>Citation</b></td><td></td></tr> <tr><td></td><td><b>FTB Notice</b></td><td></td></tr> </table>		<b>Aff.Sub.Wit.</b>		✓	<b>Verified</b>			<b>Inventory</b>			<b>PTC</b>			<b>Not.Cred.</b>		✓	<b>Notice of Hrg</b>		✓	<b>Aff.Mail</b>	W		<b>Aff.Pub.</b>			<b>Sp.Ntc.</b>			<b>Pers.Serv.</b>			<b>Conf. Screen</b>		✓	<b>Letters</b>		✓	<b>Duties/Supp</b>			<b>Objections</b>			<b>Video Receipt</b>			<b>CI Report</b>			<b>9202</b>		✓	<b>Order</b>			<b>Aff. Posting</b>			<b>Status Rpt</b>			<b>UCCJEA</b>			<b>Citation</b>			<b>FTB Notice</b>		<b>HEARING ON PETITION FOR PROBATE: 4-22-14</b>  <p><b>LEO KERMOYAN</b>, Son, is Petitioner and requests appointment as Special Administrator with limited authority under IAEA as follows:</p> <p>Petitioner states the decedent died on 11-24-11 owning as his sole and separate property an apartment complex that qualifies for Section 8 housing under the US Dept. of Housing and Urban Development. Currently, 8 of the 12 units are rented.</p> <p>The decedent's wife and beneficiary under his will, Rose Saroyan Kermoyan, had been collecting the rents; however, she died on 2-27-14. The successor beneficiary is Sheryl Kermoyan, the decedent's sister, who is currently living in Horizon Health, and although competent, is unable to manage the property due to her advanced age.</p> <p>The Dept. of Housing will no longer pay the landlords or subsidize the renters until the property has been transferred or placed under probate administration where an administrator is authorized to collect rents, maintain, and manage the property.</p> <p><b>Accordingly, Petitioner requests appointment as Special Administrator with the powers needed to continue renting to Section 8 qualified renters and collecting funds in order to maintain the value of the units by doing the following:</b></p> <ol style="list-style-type: none"> <li>1. Taking possession and control of all real property and personal property and specifically the 12 apartment units located at 3402 E. Clinton in Fresno in order to preserve it from damage, waste, and injury;</li> <li>2. Collect all claims, rents, and other income belonging to the estate;</li> <li>3. Pay all debts due associated with ownership and maintenance of the property, specifically the insurance and property taxes;</li> <li>4. Open an estate checking account for the purpose of collection of payments from the Dept. of Housing for proportionate rental payments of qualified Section 8 renters and other renters; and</li> <li>5. Conduct, manage, and continue the maintenance and operation of renting apartment units at the property.</li> </ol>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <p><b>Note:</b> The decedent's will dated 8-11-04 names his wife Rose Kermoyan as executrix, and his sister Sheryle Kermoyan as Alternate. Sheryle Kermoyan has executed a Declaration to Serve as Executor and Nomination of Petitioner as Special Administrator and Executor (attached).</p> <p><b>Note:</b> Petitioner states he and his two siblings Kathy Kermoyan and David Jack Kermoyan are the remaining beneficiaries. Kathy has signed a consent; however, per David Jack Kermoyan is developmentally challenged and resides in a group home and is unable to consent because he would lack understanding of the petition. Petitioner further requested that service to David Jack Kermoyan be excused. Pursuant to Court Order filed 3-21-14, notice was served on Sheryl Kermoyan and Kathy Kermoyan.</p> <ol style="list-style-type: none"> <li>1. In addition to the specific powers requested, Petitioner also requests limited authority under the IAEA during the special administration, which requires publication. However, under Probate Code §8540, the Court may appoint a Special Administrator to exercise any powers that may be appropriate. In this case, the order specifies the necessary powers that are requested. Therefore, limited authority under IAEA may not be appropriate or necessary at this time during the special administration.</li> <li>2. Petitioner does not address bond and Sheryle Kermoyan's nomination of Petitioner does not waive bond. Petitioner alleges a total estate value of \$302,800.00 (\$22,800.00 in personal property and \$280,000.00 in real property). Therefore, the Court may require bond of \$302,800.00.</li> </ol> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td><b>Reviewed by:</b> skc</td></tr> <tr><td><b>Reviewed on:</b> 3-27-14</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b></td></tr> <tr><td><b>File 20 - Kermoyan</b></td></tr> </table>	<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 3-27-14	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 20 - Kermoyan</b>
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<b>DOD: 01/29/98</b>		<p><b>DENNIS W. SNIFFIN, JAMES L. SNIFFEN, and CELESTE M. FISHER</b>, children of the decedent, are Petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>I &amp; A                      -                      \$9,800.00</p> <p>Will dated 08/27/97 devises her estate equally to her 4 children.</p> <p>Son, Mark Sniffen, assigns his interest in the estate 1/2 to Dennis Sniffen and 1/2 to James Sniffen.</p> <p>Petitioners request court determination that the decedent's 100% interest in mineral interests in real property pass to them pursuant to decedent's will and subject to the assignment of interest by Mark Sniffen.</p> <p><b>Declaration of Robyn L. Esraelian in Support of Petition to Determine Succession to Real Property filed 03/26/14</b> states: this Petition was originally set for hearing on 02/20/14. The Court was not inclined to grant the Petition due to the nature of the Assignment of one of the beneficiary's interest in the property to be distributed. County Counsel, being present in the courtroom, offered to have the matter turned over to the Public Guardian, who had the authority to transfer the property per the request in the Petition pursuant to CA Probate Code § 7660(a)(2), without the need for the court to enter an order thereon. The matter was continued to 03/06/14, to allow the Public Guardian time to review the matter. The matter was not taken off calendar so that Petitioners would not have to re-file their Petition in the event the Public Guardian was unable to assist in the transfer of the property. After communicating with the Public Guardian's office it was clear that the matter would not be ready for the March 6, 2014 hearing date. The Probate Clerk's office was contacted by Petitioner's attorney and a continuance to 04/01/14 was requested, however, it was discovered after the 03/06/14 that the matter was not continued on that date and no appearance was made. The matter was continued to 03/27/14. Attorney Esraelian is unable to attend the hearing on 03/27/14, but another attorney will appear in her place.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 03/27/14</b></u></p> <p><b>As of 03/27/14, nothing further has been filed in this matter.</b></p> <p>1. There appears to be no provision in the Probate Code for Assignments in Summary Proceedings.</p>
<b>Cont. from 022014, 030614, 032714</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>		w/
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 03/27/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21 – Sniffin</b></p>	

**1A Louis Brosi, Sr. (Trust)****Case No. 07CEPR01213**

Atty David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)  
 Atty Armo, Lance (for Robert Snow)  
 Atty Paul Franco (for Louis Brosi, III)  
 Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

**Notice of Motion and Motion to Compel Performance Under Settlement Agreement**

		<b>CINDY SNOW HENRY</b> , Trust beneficiary, filed Notice of Motion and Motion to Compel Performance Under Settlement Agreement on 3-15-11.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Previously, there were four (4) separate matters on calendar:</b>  <b>Page A:</b> Ms. Henry's Motion filed 3-15-11  <b>Page B:</b> Court Trial (Previously: Status Conference Re: Lot Split & Related Matters)  <b>Page C:</b> Ms. Henry's Petition filed 11-5-12  <b>Page D:</b> Settlement Conference Re: Issue of Removing Louis Brosi, Jr. (per Min Order 1-2-13 of Cindy Henry's Motion filed 3-15-11, Page 2A)  <b>Note:</b> CINDY SNOW HENRY filed a new Petition to Remove Trustee; Appoint Public Administrator as Trustee; Require Trustee Correct Title; and Compel Trustee to Account on 11-5-12 (Page 1C).  <b>Update:</b> On 3-3-14, the Court made orders in connection with Page C (Ms. Henry's Petition filed 11-5-12). Therefore, that matter was not continued.  <b>However, no orders have been submitted for signature.</b>  <b>1. The Court may require updated information regarding whether Petitioner intends to pursue a ruling on <u>this petition</u> with reference to the new petition filed 11-5-12 <u>and orders made on 3-3-14.</u></b>
<b>Cont. from 121012, 010213, 020413, 030413, 031213, 041813, 051713, 062813, 081213, 091613, 102213, 112113, 120213, 121813, 012914, 030314</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>		The petition seeks to have the court order <b>LOUIS BROSI, III</b> carry out the acts necessary to partition the property into three parcels anticipated and directed by the settlement reached 3-5-09.  <b>LOUIS BROSI, JR.</b> filed Opposition on 4-28-11 stating that new issues have arisen since the settlement.  <b>Minute Order 1-2-13:</b> Mr. Wilson is appearing as counsel for Louis Brosi, Jr. Counsel requests a continuance. The Court sets a Settlement Conference for 2/4/13. Parties are directed to submit their settlement conference briefs along with courtesy copies for the Court by 1/30/13. Mr. Wilson is directed to submit any further objections by 1/30/13. The Court indicates to all counsel that it will entertain any order presented upon consent of the parties. Mr. Franco is directed to submit an order prior to 2/4/13 for the purpose of expediting the County process. Continued to 2-4-13 at 10:30am in Dept 303. Set on 2-4-13 at 10:30am in Dept 303 for Settlement Conference Re: Issue of Removing Louis Brosi, Jr.	
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> skc <b>Reviewed on:</b> 3-26-14 <b>Updates:</b> <b>Recommendation:</b> <b>File 1A - Brosi</b>	

**Dept. 303, 9:00 a.m. Tuesday, April 1, 2014**

**1B Louis Brosi, Sr. (Trust)**

Case No. 07CEPR01213

Atty David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)  
 Atty Armo, Lance (for Robert Snow)  
 Atty Paul Franco (for Louis Brosi, III)  
 Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

**Court Trial (Previously: Status Conference Re: Lot Split & Related Matters)**

		NEEDS/PROBLEMS/COMMENTS:
		<u>Note: This matter is set for Court Trial pursuant to Minute Order 12-10-12.</u>
Set on 121012, 010213, 020413, 030413, 031213, 041813, 051713, 062813, 081213, 091613, 102213, 112113, 120213, 121813, 012914, 030314		(Examiner kept this matter's place as "B" page to keep matters in order.)
	Aff.Sub.Wit.	<u>Minute Order 12-10-12</u> <u>(Continued Status Conference Re: Lot Split &amp; Related Matters):</u> Mr. Franco informs the Court that the issues have been resolved and the map has been filed with the County. Matter set for Court Trial on 1/2/13. The Court directs all counsel to file their briefs by 12/20/12.
	Verified	
	Inventory	<u>Minute Order 12-18-13:</u> The Court will sign the stipulation and order regarding the lot split which is to be filed and not released until the parties have received payment, the promissory note, and the settlement agreement. Counsel is directed to prepare the necessary documents and provide the appropriate notice.
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	Reviewed by: skc
	Order	Reviewed on: 3-26-14
	Aff. Posting	Updates:
	Status Rpt	Recommendation:
	UCCJEA	File 1B - Brosi
	Citation	
	FTB Notice	

**1C Louis Brosi, Sr. (Trust)**

Case No. 07CEPR01213

Atty David M. Gilmore and Ryan M. Janisse (for Cindy Snow Henry – Beneficiary – Petitioner)  
 Atty Armo, Lance (for Robert Snow)  
 Atty Paul Franco (for Louis Brosi, III)  
 Atty Wilson, Joshua G. (of Bakersfield, for Louis Brosi, Jr.)

**Status Hearing**

		<p><b>On 3-3-14, the Court granted Ms. Henry's petition filed 11-5-12.</b></p> <p><b>Minute Order states:</b> The Court removes Louis Brosi, Jr., as the trustee and appoints Doris Brosi as successor trustee. Counsel is directed to submit a revised order. See Minute Order for Status Hearing (Page D) for further details.</p> <p><b>Minute Order (Status Hearing, Page D) states:</b> The Court removes Louis Brosi, Jr. as the trustee and appoints Doris Brosi as successor trustee. An offer is made in open court. Mr. Gilmore's client is directed to respond to the offer by no later than 5:00 p.m. on 3/5/14. Parties agree that Mr. Armo's client will be paid in full \$100,000.00 by the close of business tomorrow with a joint check made out to both Mr. Armo and Robert Snow. The litigation guarantee and appraisal as to 6706 N. Chestnut shall be due by 3/12/14. Additionally, the \$100,000.00 payment to Cindy Snow Henry as well as the first monthly installment shall be due by 4/1/14. Continued to 4/1/14 @ 10:00 a.m. Dept. 303</p> <p><b>As of 3-26-14, an order has not been submitted for signature.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need order approving petition from Ms. Henry.</li> <li>2. Need status report regarding orders made on 3-3-14.</li> <li>3. The Court has appointed Doris Brosi as trustee. Doris Brosi has not made an appearance in this matter. Therefore, it appears that a filing/appearance fee of \$435.00 is due from Doris Brosi.</li> </ol>
<b>Cont. from 030314</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 3-26-14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1C – Brosi</b></p>	

1C